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# Personal Financial Statement

Attn.: Anthony Sherwin

877-505-3670 Toll Free  
 760-496-7063 Facsimile

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Name : \_\_\_\_\_ Age : \_\_\_\_\_ SSN : - - -

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Street Address : \_\_\_\_\_ City : \_\_\_\_\_ State : \_\_\_\_\_ Zip : \_\_\_\_\_

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Phone : ( )- - - Marital status : \_\_\_\_\_ Dependents : \_\_\_\_\_ Years at this Address : \_\_\_\_\_

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Previous Address if less than 5 years  
 Street Address : \_\_\_\_\_ City : \_\_\_\_\_ State : \_\_\_\_\_ Zip : \_\_\_\_\_

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Employer : \_\_\_\_\_ Emp.City : \_\_\_\_\_ State : \_\_\_\_\_ Phone : ( )- - -

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Spouse Name : \_\_\_\_\_ Age : \_\_\_\_\_ SSN : - - -

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Spouse Employer : \_\_\_\_\_ Emp.City : \_\_\_\_\_ State : \_\_\_\_\_ Phone : ( )- - -

## FINANCIAL CONDITION AS OF / /

ASSETS	AMOUNT	LIABILITIES	AMOUNT
CASH –Checking & Savings		NOTES PAYABLE TO BANKS	
-M.M. & IRA		-	
STOCKS & BONDS –Schedule 1		Credit Cards	
-Listed		OTHER NOTES PAYABLE	
-Unlisted		-Real Estate Loans – Schedule 2	
REAL ESTATE-Schedule 3		-Home Equity Line of Credit	
		-Auto Loans	
LIFE INSURANCE-Cash Value		-Loans on Life Insurance	
ACCOUNTS & NOTES RECEIVABLE		TAXES PAYABLE	
-Relatives & Friends		-Unpaid Income Taxes	
-Collectible		-Unpaid Real Estate Taxes	
		OTHER DEBTS	
OTHER PERSONAL PROPERTY		-	
-Automobiles		-	
-Artwork		TOTAL LIABILITIES	
-Furnishings		NET WORTH	
-Other			
TOTAL ASSETS		TOTAL LIABILITIES + NET WORTH	

ANNUAL INCOME	AMOUNT	ANNUAL EXPENDITURES	AMOUNT
Salary, Wages, Bonus & Commission		Property Tax & Assessments	
Dividends & Interest		Federal & State Income Tax	
Rentals (Gross)		Real Estate Loan Payments	
Other Income (Alimony, Child Support or Maintenance need not be listed unless you wish it to be considered for granting credit.)		Payments on Contracts & Notes	
		Insurance Premiums	
		Estate Living Expenses	
		Other	
TOTAL INCOME		TOTAL EXPENDITURES	

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Face Amount	Beneficiary	Company
Life Insurance \$		

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Are you a Guarantor, Co-maker or Endorser on anyone's debt?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have any other business connection?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever gone through bankruptcy?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Have you previously borrowed from other banks?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are there any suits or judgements against you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Any pending?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are any of your assets pledged or in any other manner unavailable for payment of your debt?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If the answer is yes to any of the above questions, please explain on a separate sheet, attach, date, and sign the explanation.	

**SCHEDULE 1 – LISTED AND UNLISTED STOCKS AND BONDS OWNED**

No. of shares or Par Value LISTED	DESCRIPTION	ISSUED IN NAME OF	Joint Tenancy Tenants in Common Community Property Separate Property	MARKET VALUE
TOTAL LISTED				
UNLISTED				
TOTAL UNLISTED				

Are any of the above listed securities pledged to secure a debt?  Yes  No

**SCHEDULE 2 – TRUST DEEDS AND MORTGAGES OWNED**

NAME OF PAYER	Legal description, Street Address & Type of Improvements	Unpaid Balance.	Joint Tenancy Tenants in Common Community Property Separate Property	Terms	1 <sup>st</sup> or 2 <sup>nd</sup> Lien	Value of Property
TOTAL						

**SCHEDULE 3 – REAL ESTATE (Designate : I=Improved, U=Unimproved)**

LOCATION OR DESCRIPTION	TITLE IN NAME OF	Joint Tenancy Tenants in Common Community Property Separate Property	COST	PRESENT VALUE	TRUST DEEDS, MORTGAGES OR OTHER LINES			
					Unpaid Bal.	Rate %	Monthly Payments	Held by
TOTAL								

**SCHEDULE 4 – DETAILS RELATIVE TO OTHER IMPORTANT ASSETS AND LIABILITIES**

ASSETS	LIABILITIES

The foregoing information is submitted for the purpose of obtaining credit either in my/our name, or either of us, or in the name of third persons or a corporation or other entity in whose behalf I/we, or either of us, either severally or jointly with others, may execute a guaranty in your favor. I/we understand that you are relying on the information herein contained and accordingly warrant and represent said information is complete, truthful, and accurate as of the date indicated. I/we further agree to notify you immediately of any material change with regard to the foregoing information which may occur while indebted to you.

I/we understand that in signing this statement, I/we do not become obligated to you beyond the accuracy of the information set forth above except to the extent that I/we agree to become so obligated by executing a note, guaranty, or other debt instrument.

You are authorized to make all inquiries you deem necessary to verify the accuracy of the information set forth herein and to determine my/our credit-worthiness. You are further authorized to answer any questions concerning your credit experience with me/us.

APPLICANT, CO-APPLICANT (SPOUSE) SIGNATURE (S)	DATE